

CAMPAIGN MATCH SUPPLEMENT

Job Aid

WHAT IS A CAMPAIGN MATCH SUPPLEMENT?

The Campaign Match Supplement is a complementary report to the Campaign Counting suite of reports. This report helps units/departments see how much money has been set aside but not yet transferred into their funds. This report may be produced for the entire campaign, a specific unit or a specific department. It includes the amount encumbered for each distinct match campaign, as well as a total encumbered.

This report is only available as a PDF.

HOW TO ACCESS A CAMPAIGN MATCH SUPPLEMENT REPORT

1. Log in to [ABE CRM](#).
2. On the navigation bar, click **WFAA Reports**.
3. Click **Campaign Match Supplement Report**.
4. Select **All units** or a specific unit
5. Select **Show Separate Departments – Yes** if you would like to see totals by department.
6. Click **View Report**.

HOW TO INTERPRET A CAMPAIGN MATCH SUPPLEMENT REPORT

Why do we need a Match Supplement Report?

When a donor makes a pledge that will be matched by a donor challenge, we “encumber” or reserve the corresponding amount of the donor challenge commitment for the appropriate fund. However, the matching money itself is not transferred immediately into the funds. While it is encumbered, it does not display in the unit or department campaign report for which it is designated. This supplement gives units and departments a way to anticipate the match dollars that will ultimately be allocated to them.

How does the match process work?

On a monthly basis, we pull a list of match-qualifying *payments* received (including pledge payments and outright gifts) and then move the associated match money into the appropriate funds. Schedule of allocations depends on payment schedule established by the matching donor. Match-qualifying gifts will be reviewed on a monthly basis, and disbursements will be made if the matching donor has made a payment.